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Aras Community Solution Add-on:

30-Aug-2013

Document Hierarchies

Add-on-Solution Package v2-1

Overview – Solution Package

„Document Hierarchies“

- ✓ Adds new Item Types to build Document Hierarchy Structures linking to individual documents
- ✓ Much like Bills Of Materials, Document Hierarchies are versionable and operate on a life cycle (Preliminary -> Released -> Obsolete)
- ✓ A separate ItemType „Document Book“, also versionable, is used to group „Document Sections“ hierarchically each "Document Section" can have owners and co-owners for exteded access control. Life cycles drive "Book" and "Sections" from 'Prliminary' to 'Released' to 'Obsolete'
- ✓ „Dummy“ TOC Item Types can be used to set up a direct access to a 'Document Book' from the TOC. Such as a „Quality Handbook“ or an „Operations Manual“ or more. TOC-Access on these items define who have access to these "Books" from the TOC directly. If displayed from TOC the effectivity is fixed to "Released”. This package includes the example for a „Quality Handbook“
- ✓ Owners and Co-Owners are allowed to do "Manual Release" of the structure (down) for „Document Books“ and on every level of „Document Sections“.
- ✓ Manual Revisioning is also allowed for Owners. If revisioning is started on a node within the document hierarchy, then all nodes on the path to the top (including to „Document Book“) will be automatically revisioned, as well. (up)
- ✓ Linked Documents must still follow their own release and revisioning process.
- ✓ Hierarchy nodes linking to documents will show released documents only , if the effectivity view on the grid is set to „Released versions of Rev“. Else the current version of linked documents will be shown.
- ✓ If a newer released version of a linked document is available on a "Released" Document Section, an icon on the grid will indicate this. In this case the "Owner" of the "Document Section" can run an action to pull in this latest released document.

What‘s new in this version

V2-1

✓Internationalizaton (toolbar,menus,messages),
✓language effectivity on Section-Document relationship

V2-0

✓Common grid handler (utiltities) improvements
✓Improved grid views, Improved versioning and access controls, misc. Renamings (“Document Collection” is now “Document Book”)
✓Renamed Effectivity views on gird (Current Version of Rev)
✓TOC variable can specify a book’s item_number and (optionally) a specific major_rev now.
✓added a grid column to highlight when document of released 'Sections' have newer generations (not is_current)

Version History

Versions:

V1-1 Initial prototypes and packaging

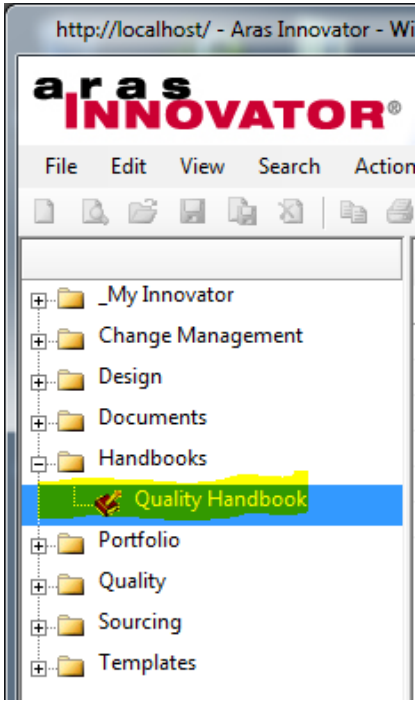
V1-3 First community release

Installation

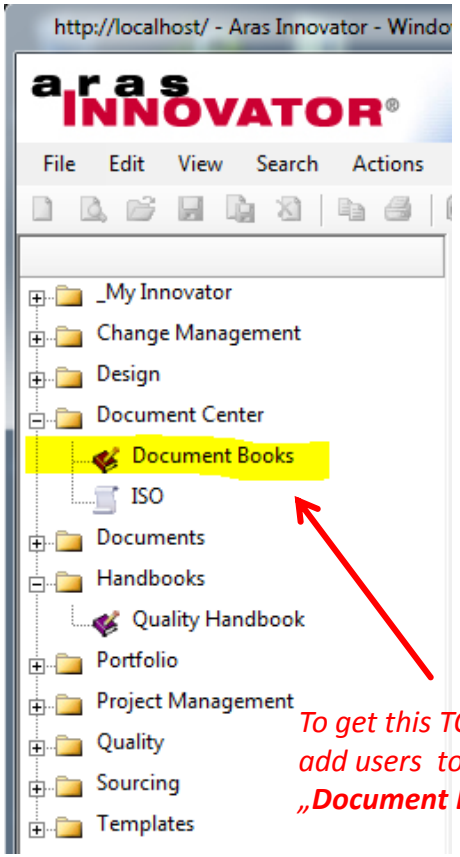
- Use the PackageImportExportUtilities to import the package „Document Hierarchies v2-1“
- Extract package to directory accessible to the import tool.
- Start the import tool, enter the URL to your Aras environment
- Import will require 3 import cycles
  - 0-Common Utilties v1-8 (partial) → import as „**admin**“, use option „**merge**“.
  - 1-Innovator Core Extensions → import as „**root**“, use option „**merge**“.
  - 2-Document Hierarchy Solution → import as „**admin**“, use option „**merge**“.
  - 3-nash Updates → use Nash Tool
- To add addtional icons used on the tree grid you must open folder ‚_CodeTreeOverlays‘ of this package and copy the folder ‚innovator‘ to your Aras installation folders (CodeTree)
- Als see „ReadMe.txt“ inside package for more installation details

TOC Access

All Employees

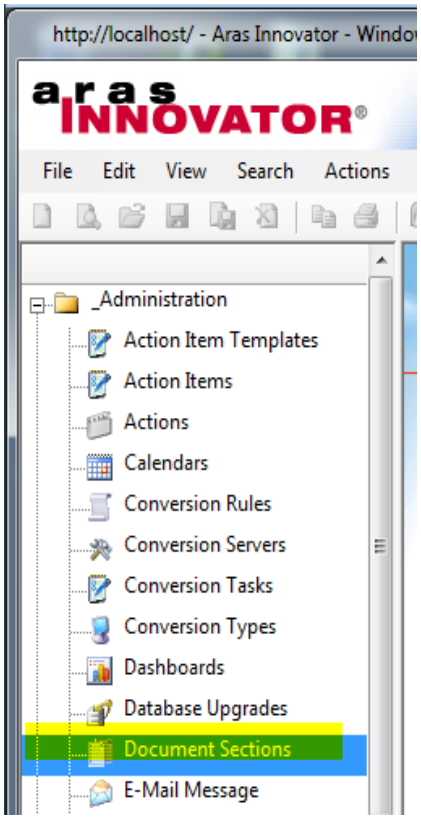


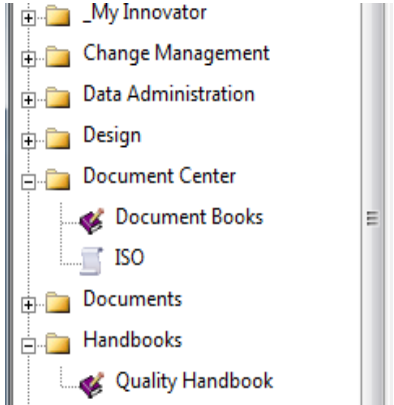
Administrators &
Document Book Management



To get this TOC entry
add users to Identity:
*„**Document Book Management**“*

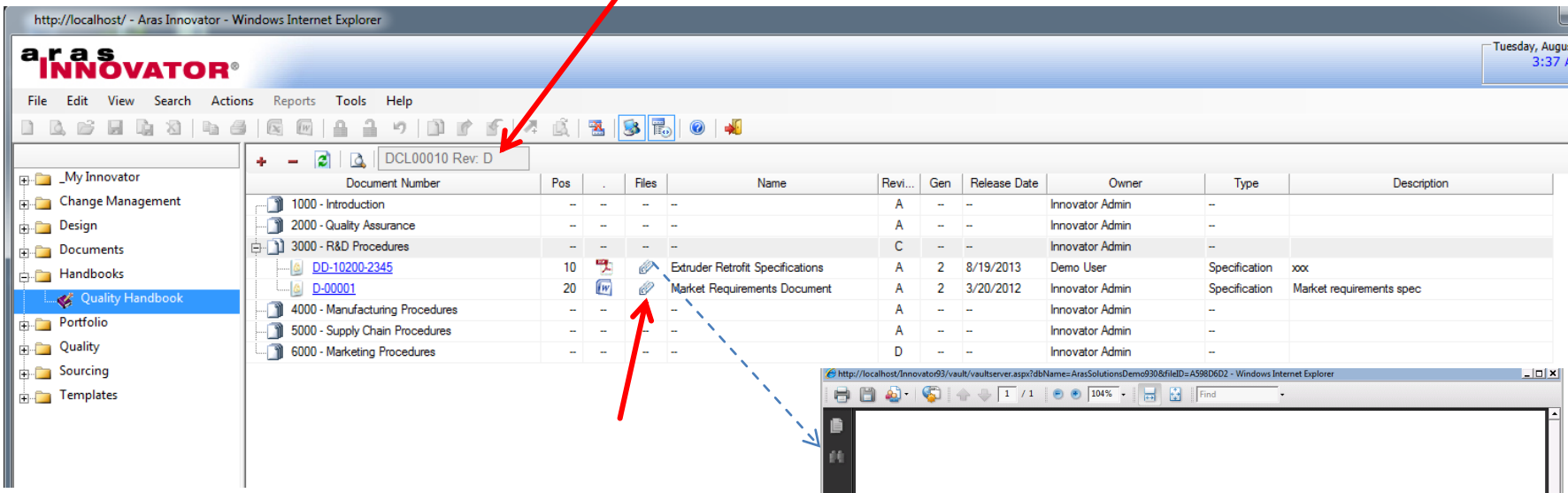
Administrators

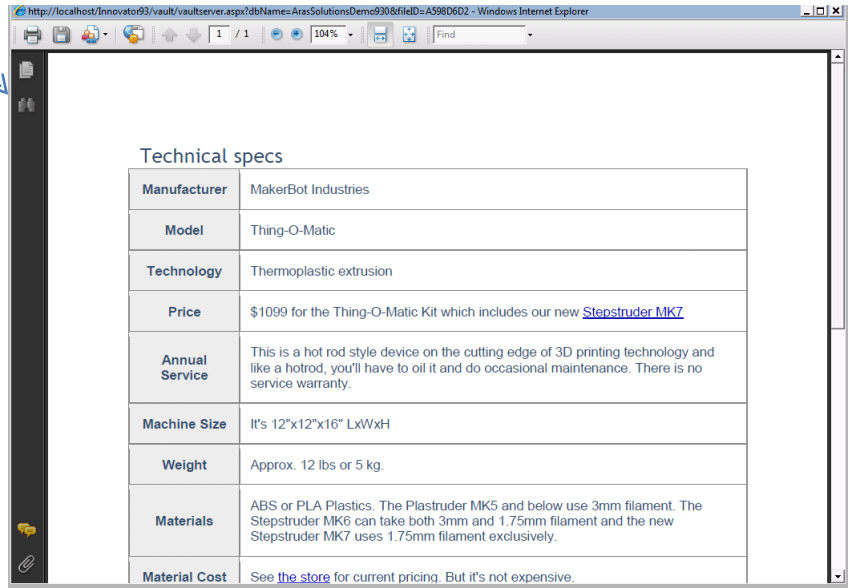




Latest Released version of a „Book“ and its related Document Hierarchy can be exposed on a separte TOC.
Permissions can be assigned to the TOC Item (i.e. All Employees)

Number and Rev of related ‚Book‘ of this Hierarchy (defined by TOCDBK_XXX variables)

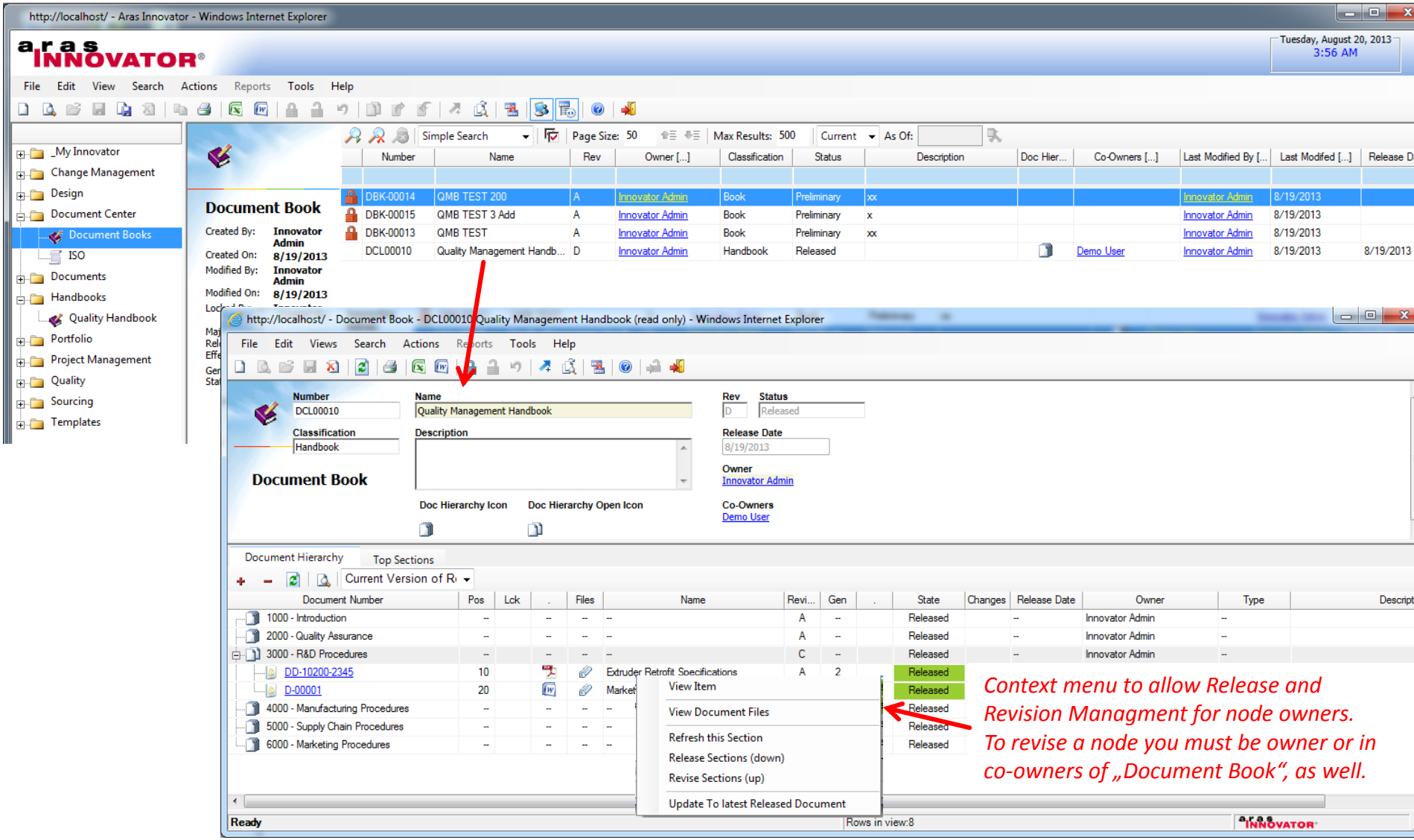




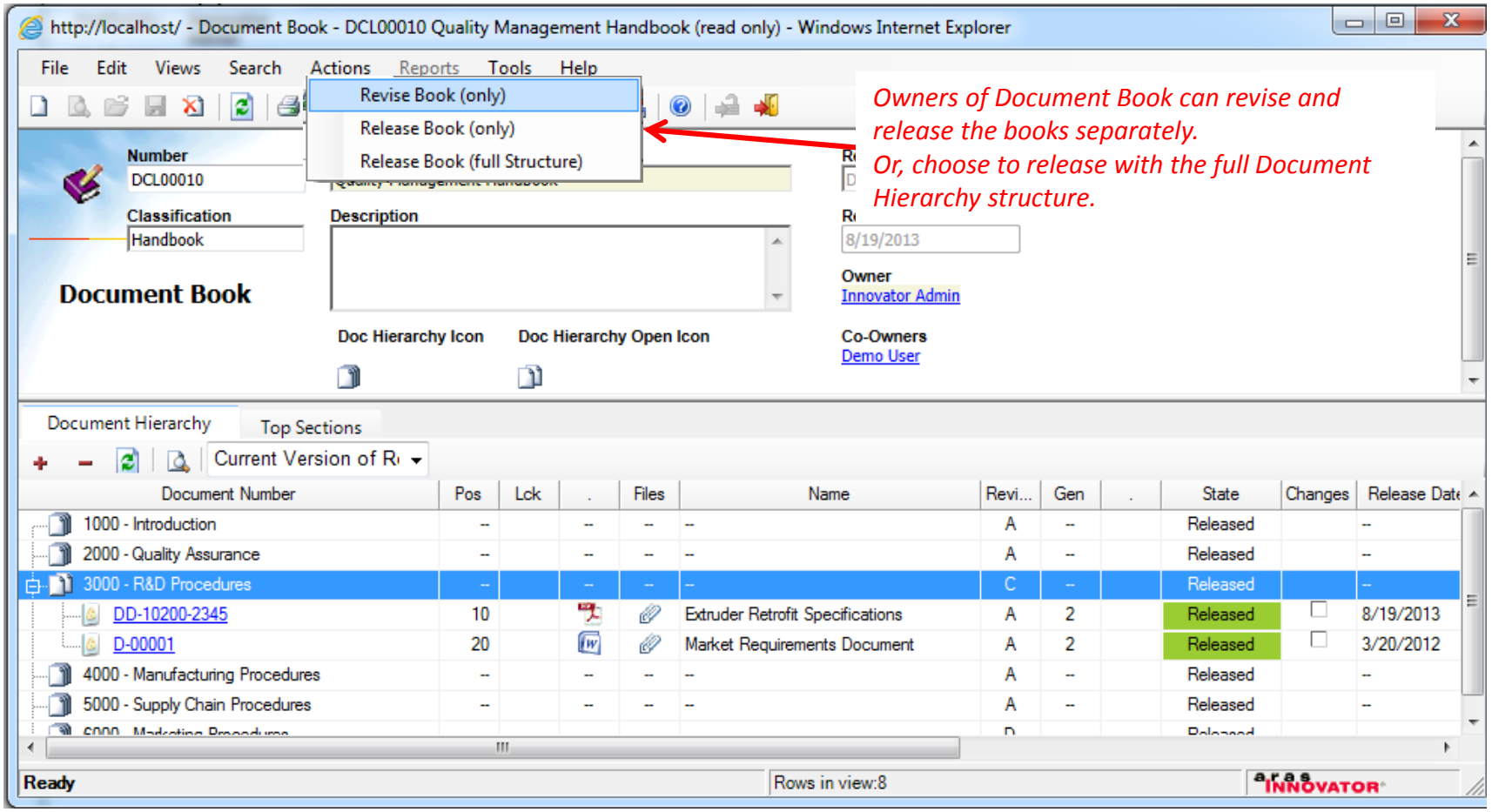
Click on icon to open attached file directly.

Adminstrators can set up variable „File Ext to View single File“
To maintain a list of possible file extensions (comma separated)

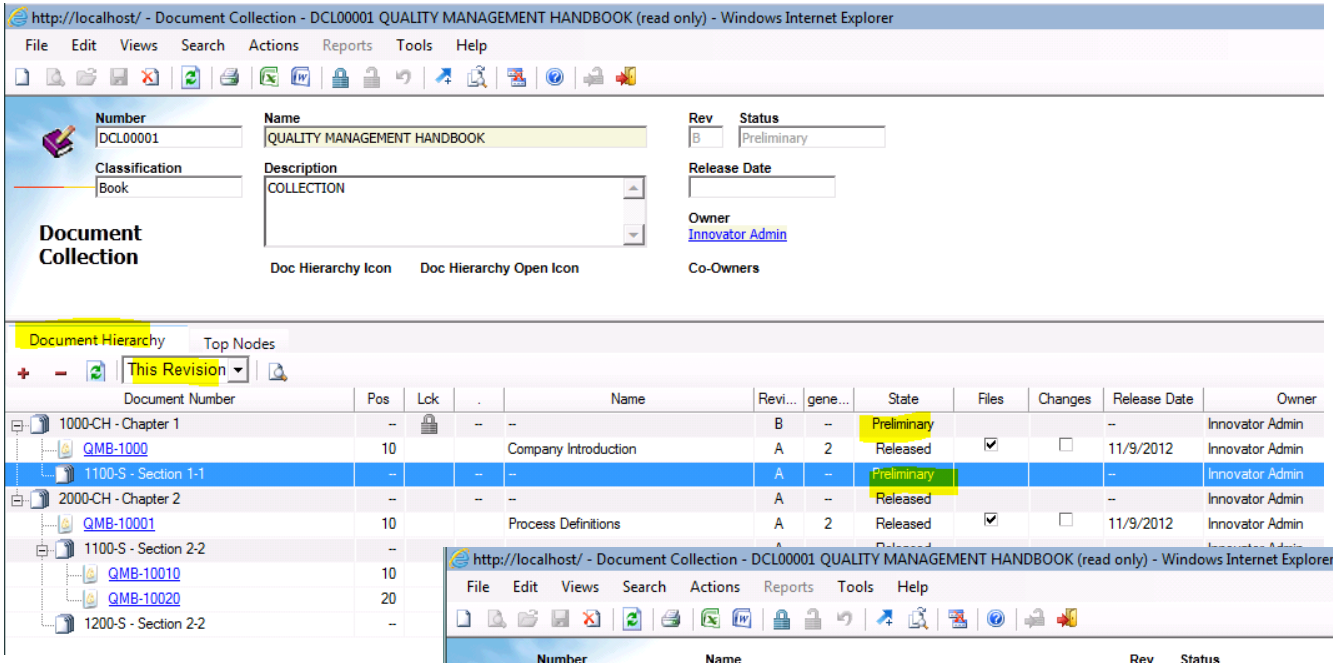
Access To „Current Version“ of a „Book“ with its Hierarchy and Documents. For Owners/Co-Owners of a „Book“

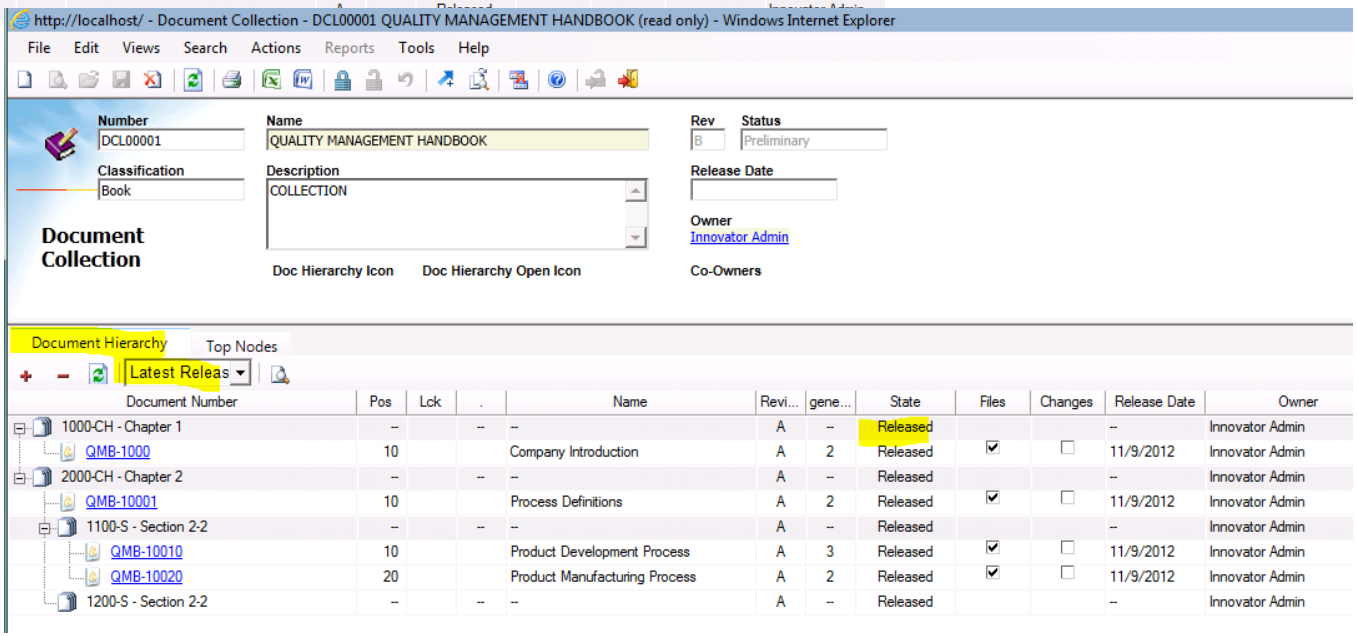


Document Book Actions

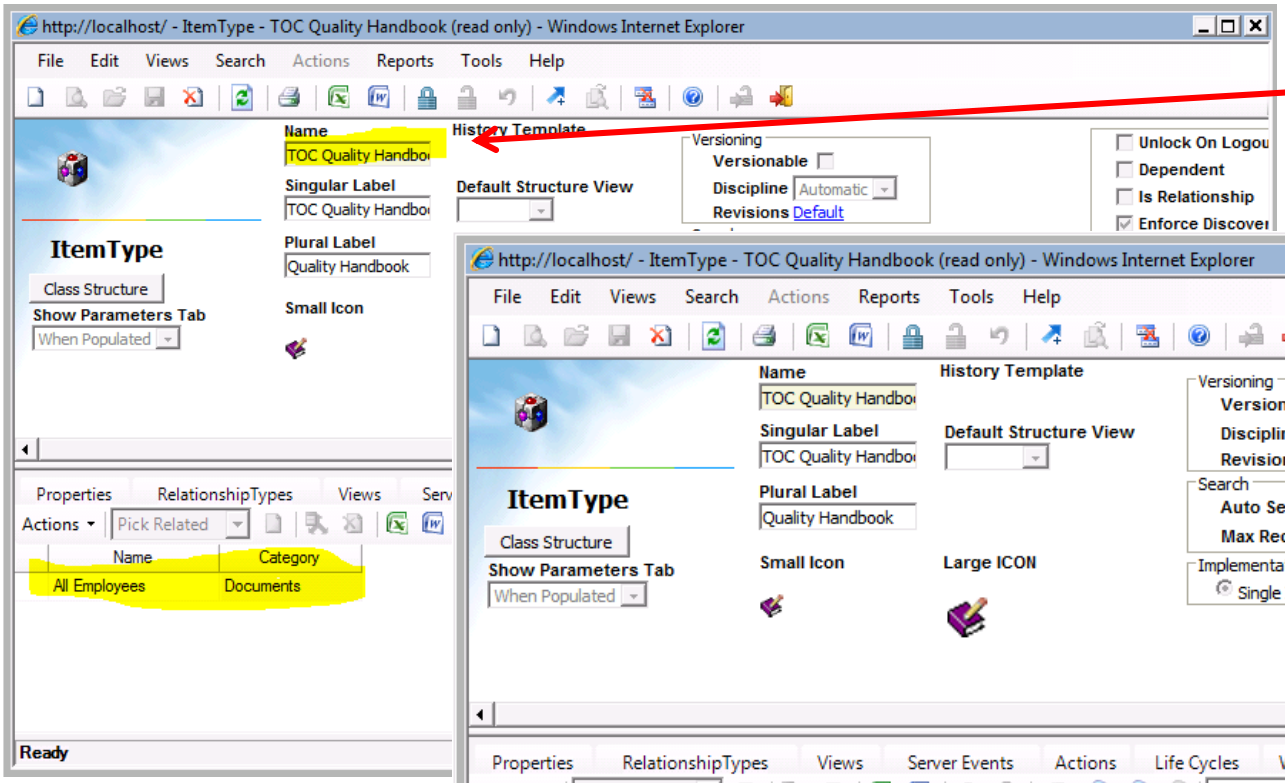


Simulate Latest Released option

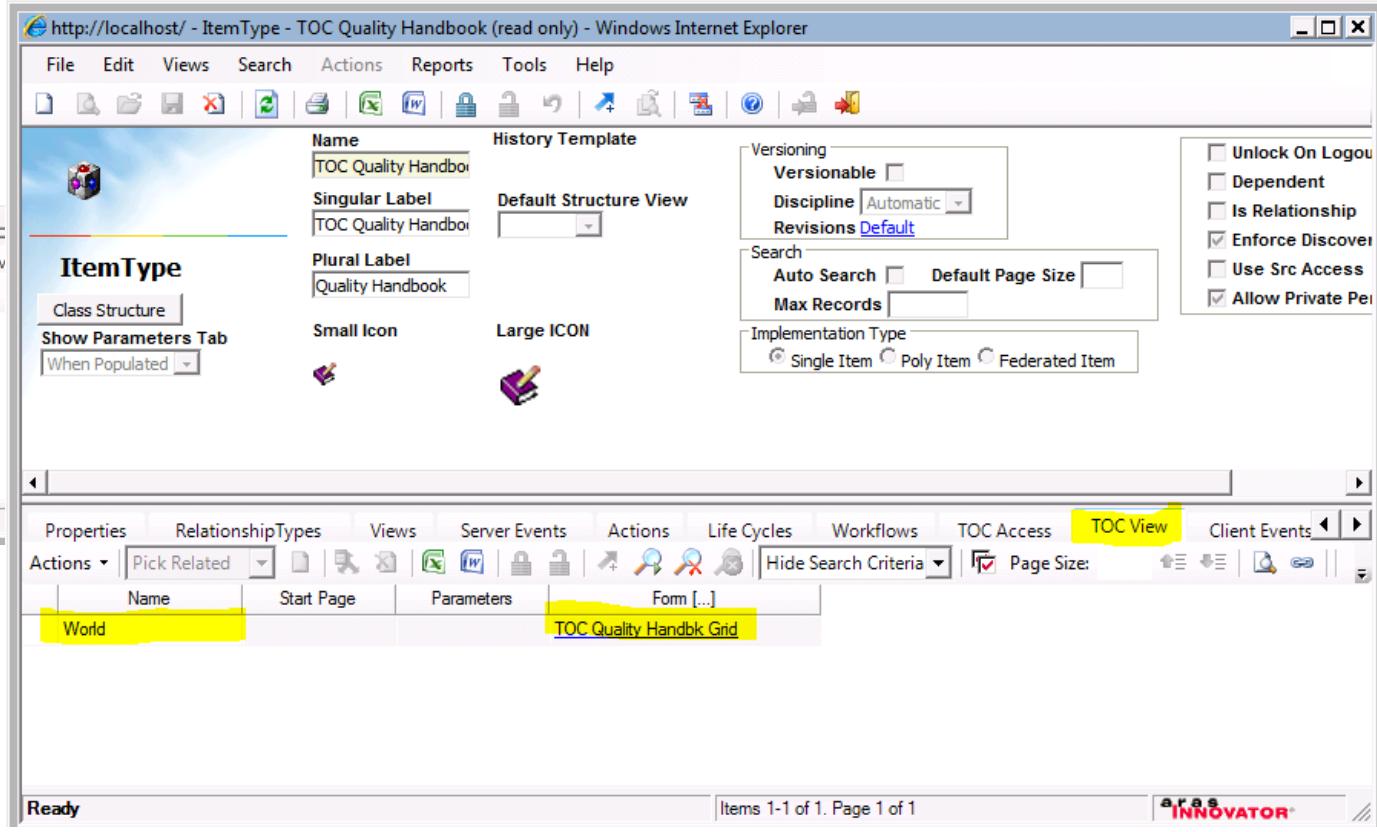




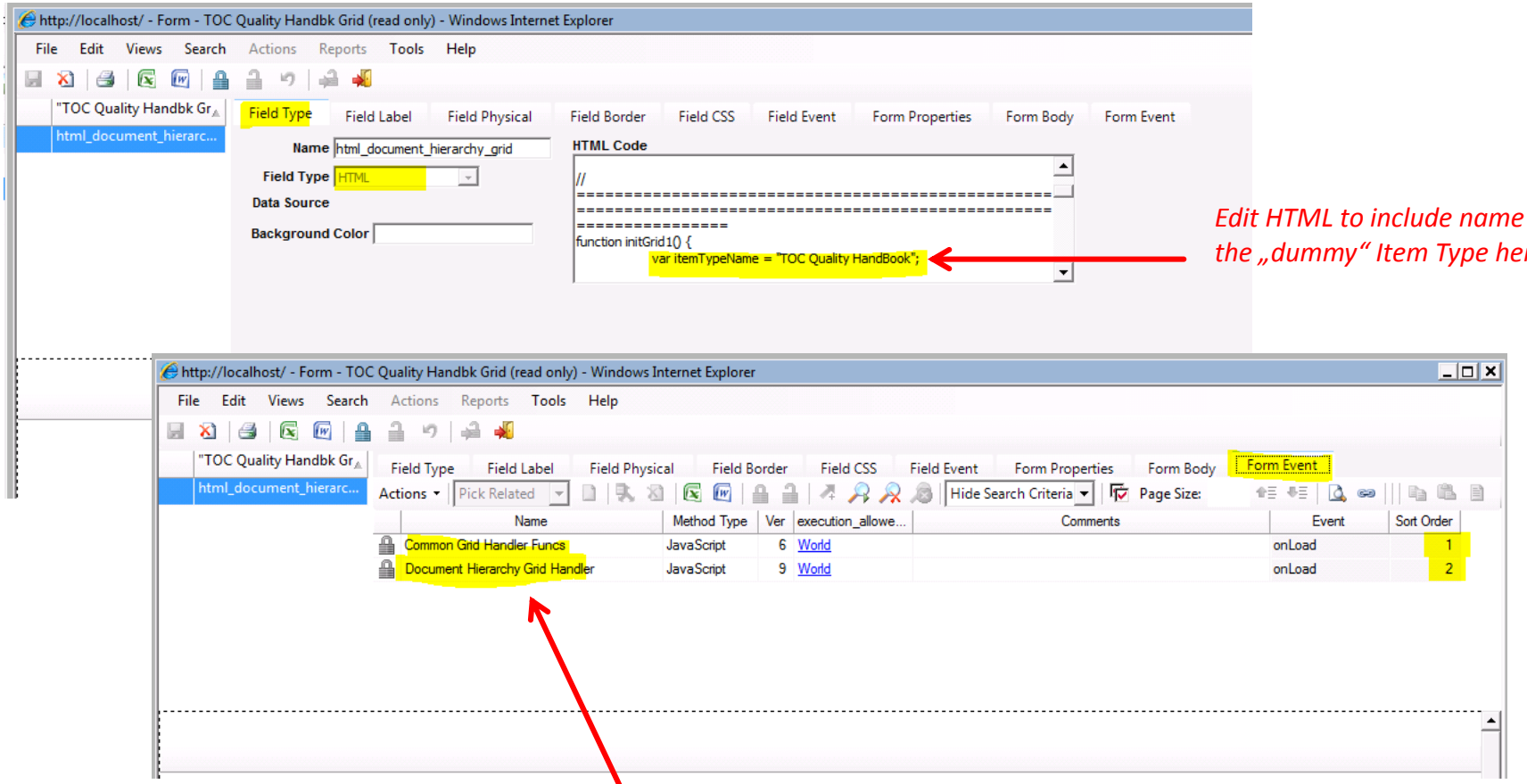
Administrators:
Set up Navigation to Document Books from TOC (1)



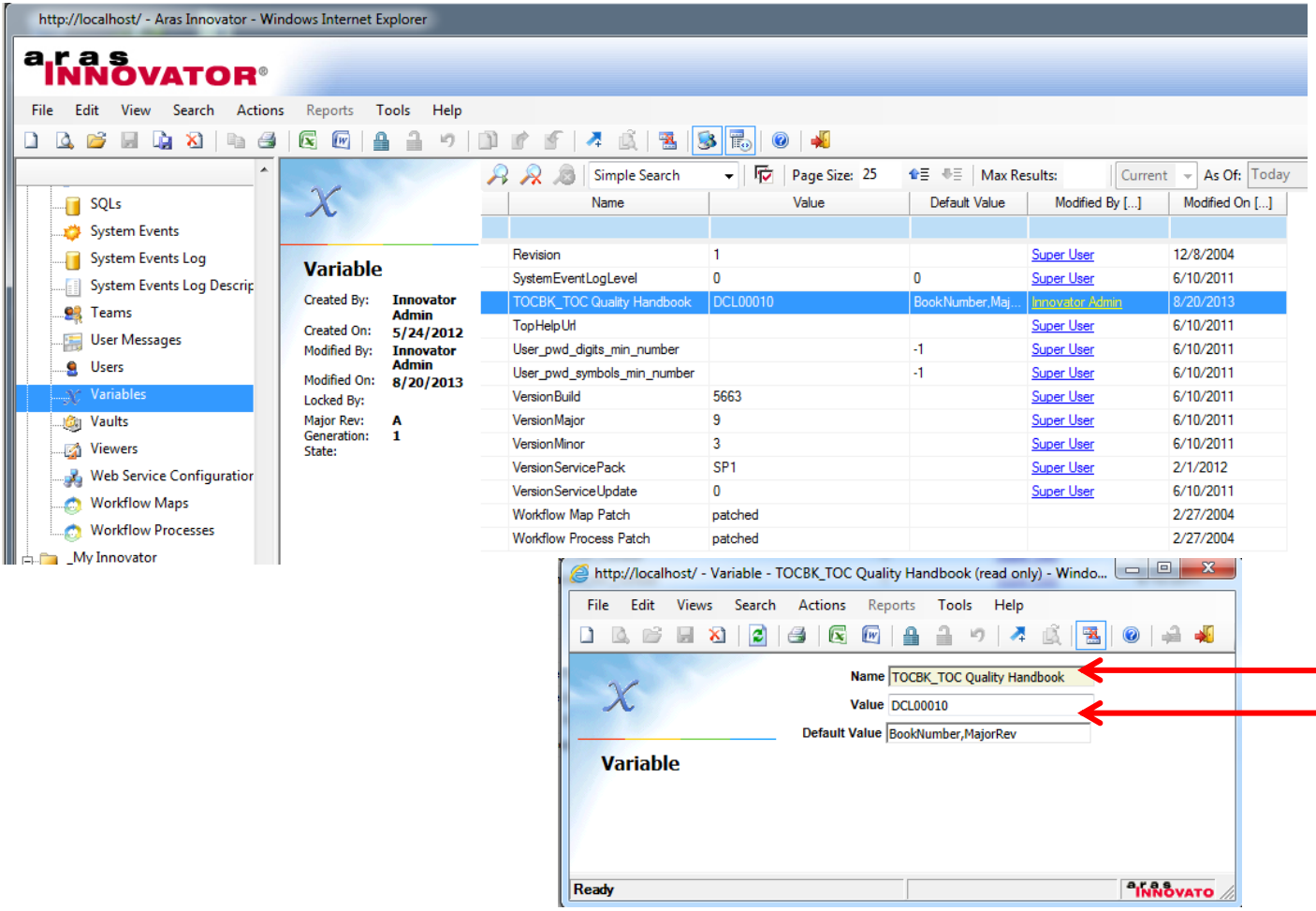
Create a „dummy“ Item Type to hold the TOC View



Set up Navigation to Document Books from TOC (2)



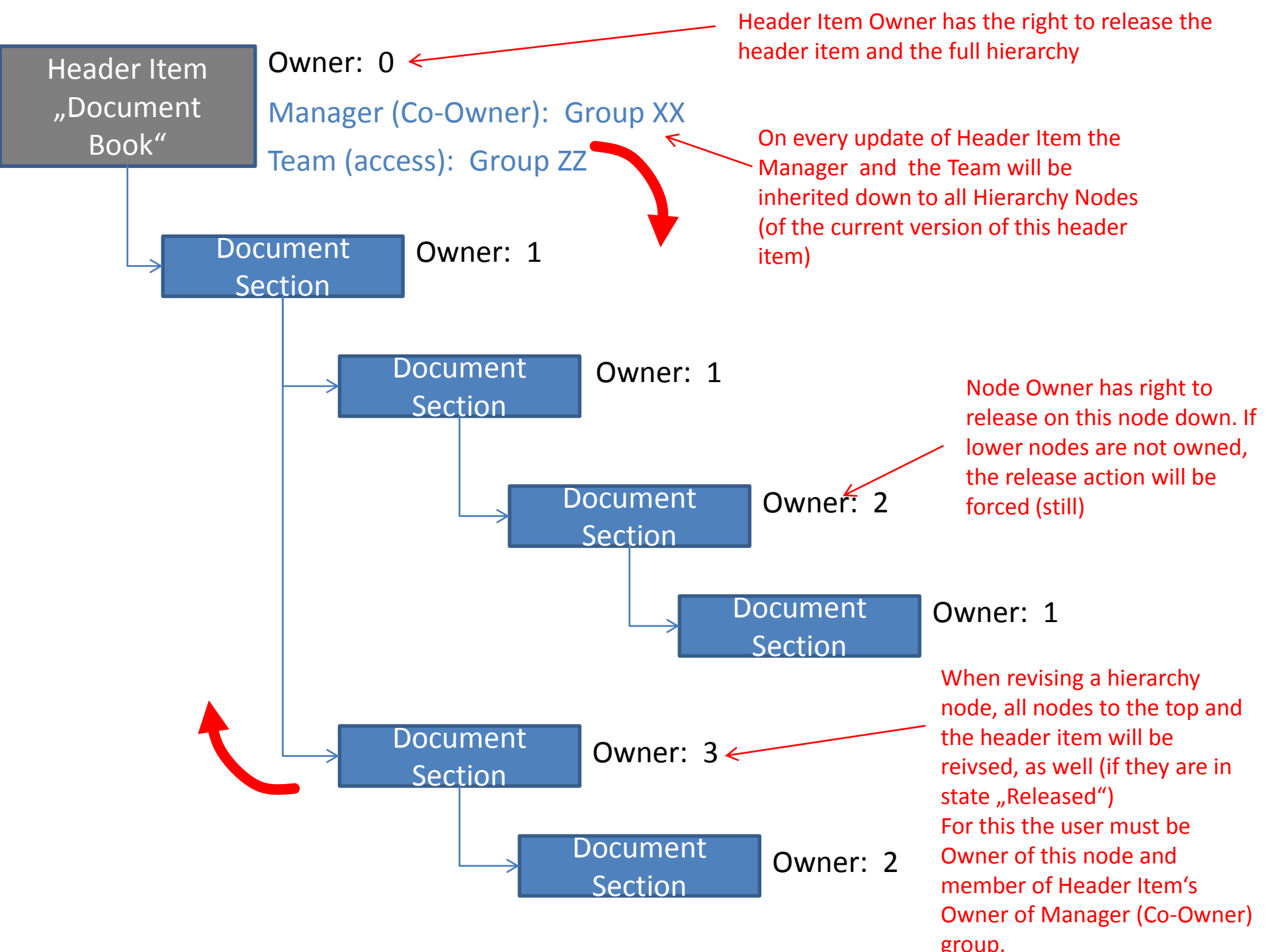
Set up Navigation to Document Books from TOC (3)



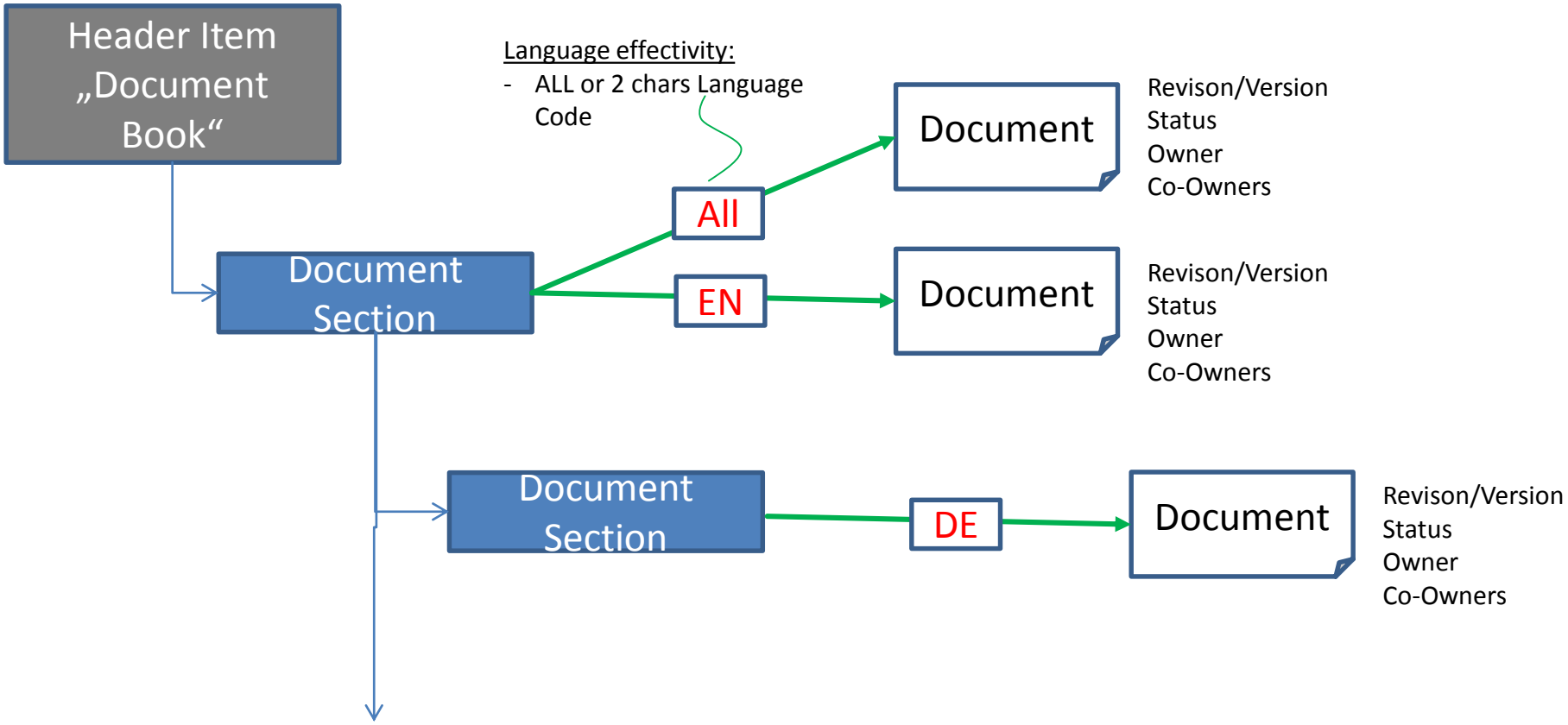
Name of the „dummy“ Item Typ with prefix „TOCDBK_“

Item_number of the (instance) item of Document Book to show from TOC.

(Optional) You can add the „Rev of this item. To display a defiine Rev of the Book on the TOC

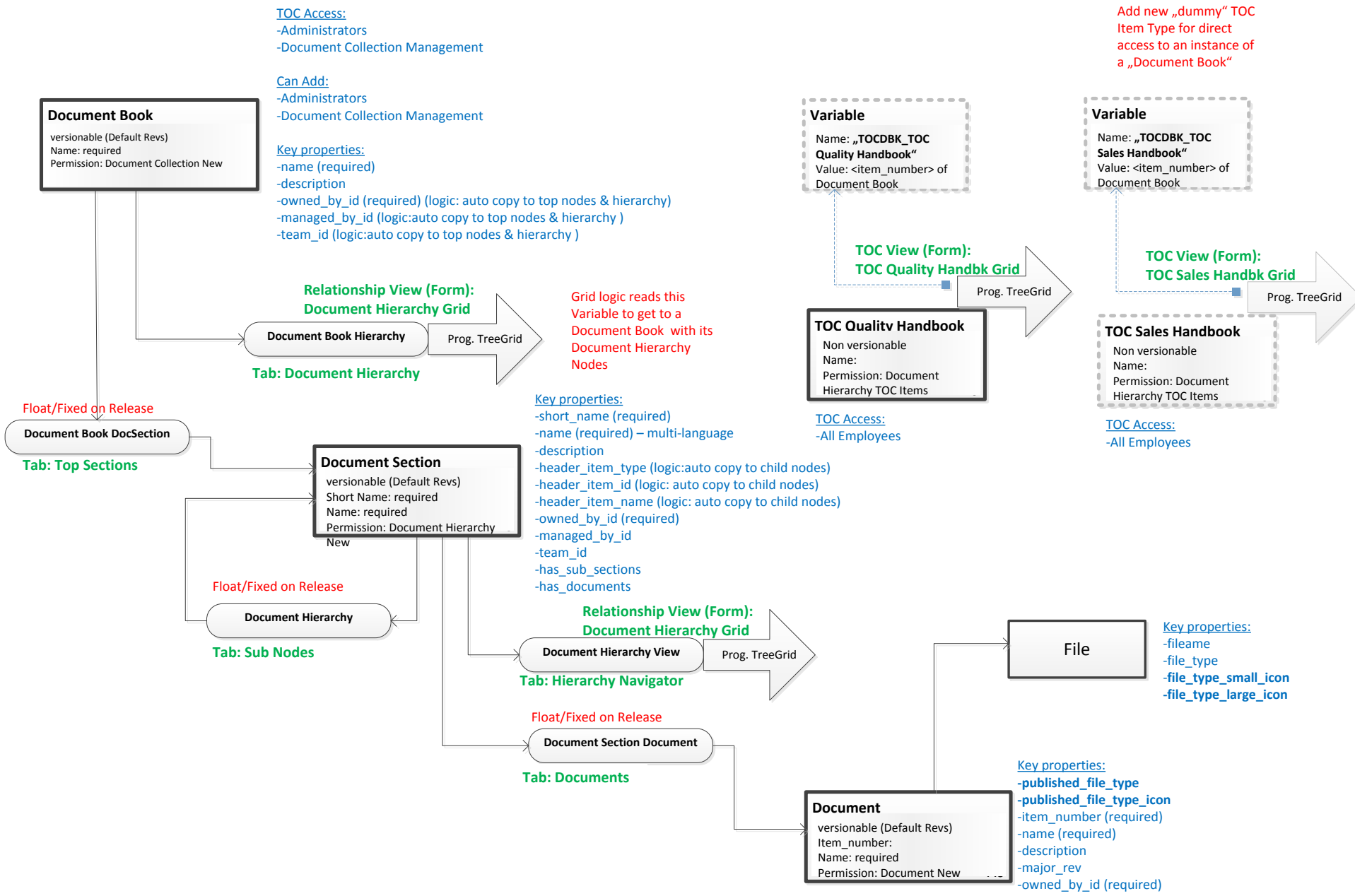

Header Item „Document Book“
Owner: 0
Manager (Co-Owner): Group XX
Team (access): Group ZZ
Header Item Owner has the right to release the header item and the full hierarchy
On every update of Header Item the Manager and the Team will be inherited down to all Hierarchy Nodes (of the current version of this header item)
Document Section
Owner: 1
Document Section
Owner: 1
Document Section
Owner: 2
Node Owner has right to release on this node down. If lower nodes are not owned, the release action will be forced (still)
Document Section
Owner: 1
Document Section
Owner: 3
When revising a hierarchy node, all nodes to the top and the header item will be reivsed, as well (if they are in state „Released“)
For this the user must be Owner of this node and member of Header Item‘s Owner of Manager (Co-Owner) group.
Document Section
Owner: 2

Documents connected to Sections with Language effectivity



If Book is viewed from TOC view, then the user‘s current language code is used to filter which language specific documents to show

Data Model


TOC Access:
-Administrators
-Document Collection Management
Can Add:
-Administrators
-Document Collection Management
Key properties:
-name (required)
-description
-owned_by_id (required) (logic: auto copy to top nodes & hierarchy)
-managed_by_id (logic:auto copy to top nodes & hierarchy)
-team_id (logic:auto copy to top nodes & hierarchy)
Add new „dummy“ TOC Item Type for direct access to an instance of a „Document Book“
Document Book
versionable (Default Revs)
Name: required
Permission: Document Collection New
Variable
Name: „TOCDBK_TOC Quality Handbook“
Value: <item_number> of Document Book
Variable
Name: „TOCDBK_TOC Sales Handbook“
Value: <item_number> of Document Book
TOC View (Form):
TOC Quality Handbk Grid
Prog. TreeGrid
TOC View (Form):
TOC Sales Handbk Grid
Prog. TreeGrid
Relationship View (Form):
Document Hierarchy Grid
Document Book Hierarchy
Prog. TreeGrid
Tab: Document Hierarchy
Grid logic reads this Variable to get to a Document Book with its Document Hierarchy Nodes
TOC Quality Handbook
Non versionable
Name:
Permission: Document Hierarchy TOC Items
TOC Sales Handbook
Non versionable
Name:
Permission: Document Hierarchy TOC Items
TOC Access:
-All Employees
TOC Access:
-All Employees
Float/Fixed on Release
Document Book DocSection
Tab: Top Sections
Key properties:
-short_name (required)
-name (required) – multi-language
-description
-header_item_type (logic:auto copy to child nodes)
-header_item_id (logic: auto copy to child nodes)
-header_item_name (logic: auto copy to child nodes)
-owned_by_id (required)
-managed_by_id
-team_id
-has_sub_sections
-has_documents
Document Section
versionable (Default Revs)
Short Name: required
Name: required
Permission: Document Hierarchy New
Float/Fixed on Release
Document Hierarchy
Tab: Sub Nodes
Relationship View (Form):
Document Hierarchy Grid
Document Hierarchy View
Prog. TreeGrid
Tab: Hierarchy Navigator
Float/Fixed on Release
Document Section Document
Tab: Documents
File
Key properties:
-fileame
-file_type
-file_type_small_icon
-file_type_large_icon
Key properties:
-published_file_type
-published_file_type_icon
-item_number (required)
-name (required)
-description
-major_rev
-owned_by_id (required)
Document
versionable (Default Revs)
Item_number:
Name: required
Permission: Document New